

Brainport Eindhoven

Wim De Kinderen

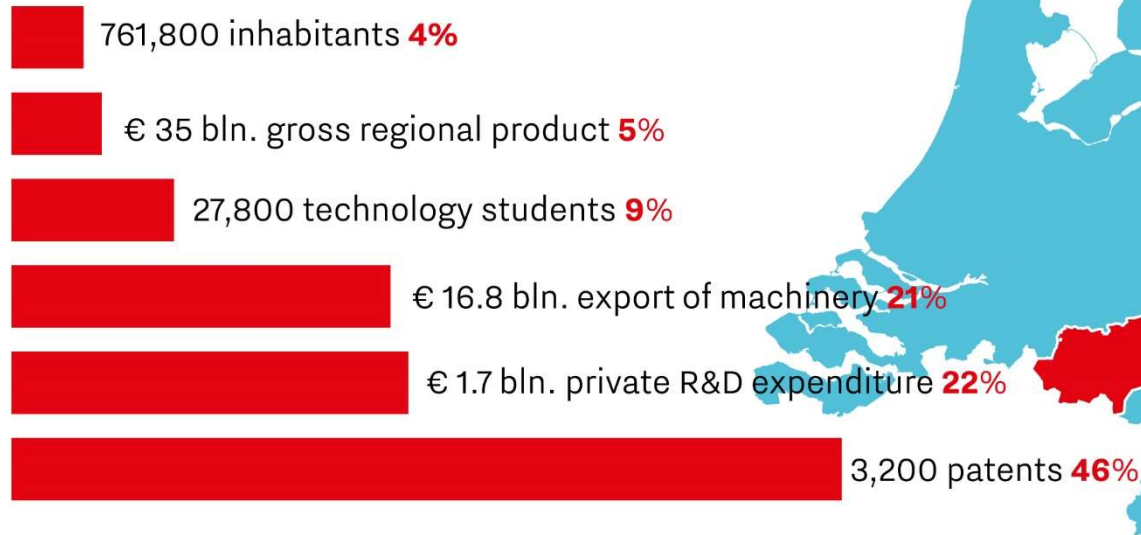
Global Corporate VCs and Innovation Networks in the
4th Industrial Era

GLORIA Workshop, Brussels 17/05/19



Brainport Eindhoven – key figures

BRAINPORT EINDHOVEN'S SHARE IN DUTCH COMPETITIVENESS



CO-CREATING THE FUTURE

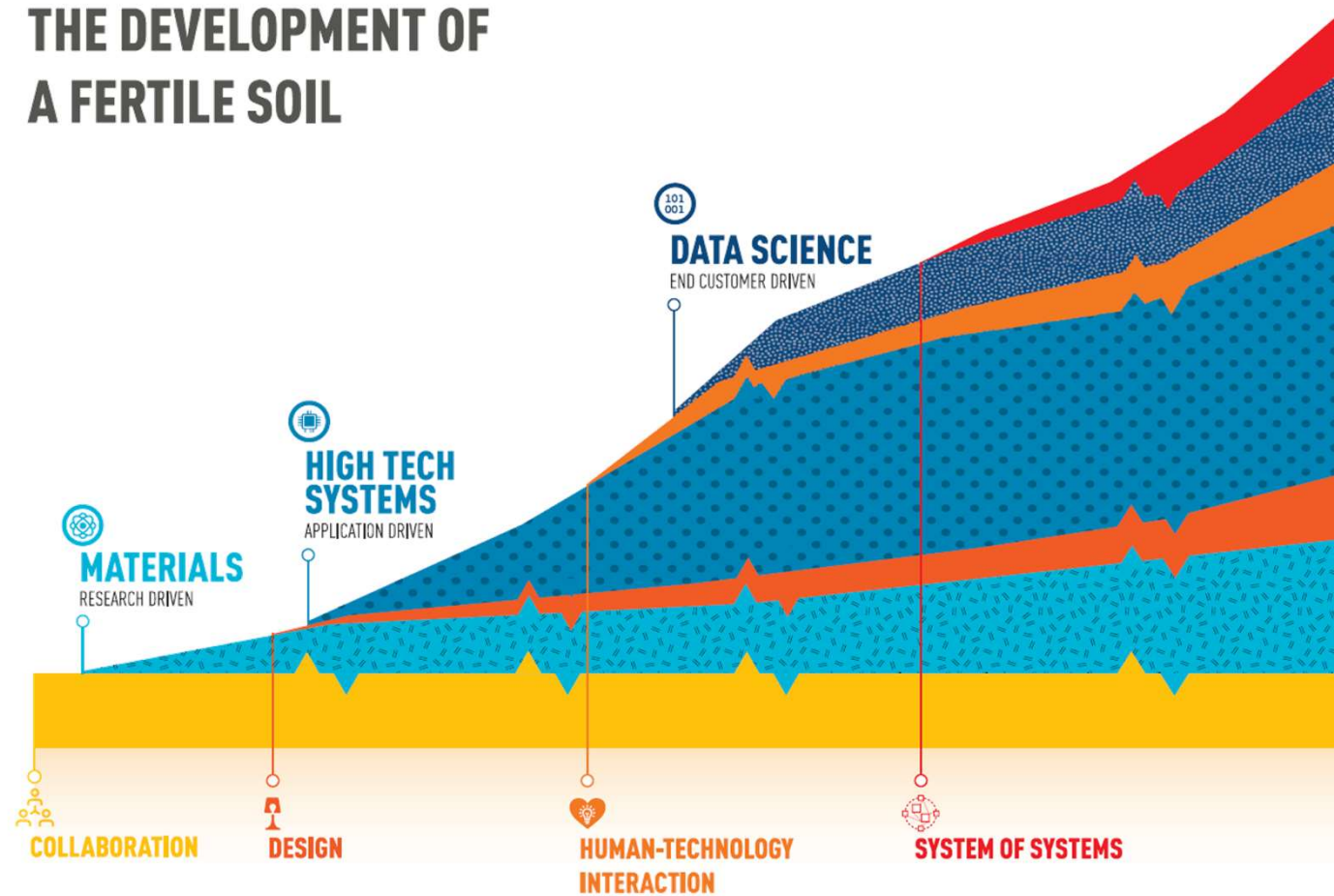
Brainport Eindhoven constant change company level



CO-CREATING THE FUTURE

Brainport Eindhoven constant change regional level

THE DEVELOPMENT OF A FERTILE SOIL



CO-CREATING THE FUTURE

BRAINPORT: PROVIDES SUPPLY CHAIN FOR HIGH-TECH



SEMICON



MEDICAL



ANALYTICAL



PRINTING



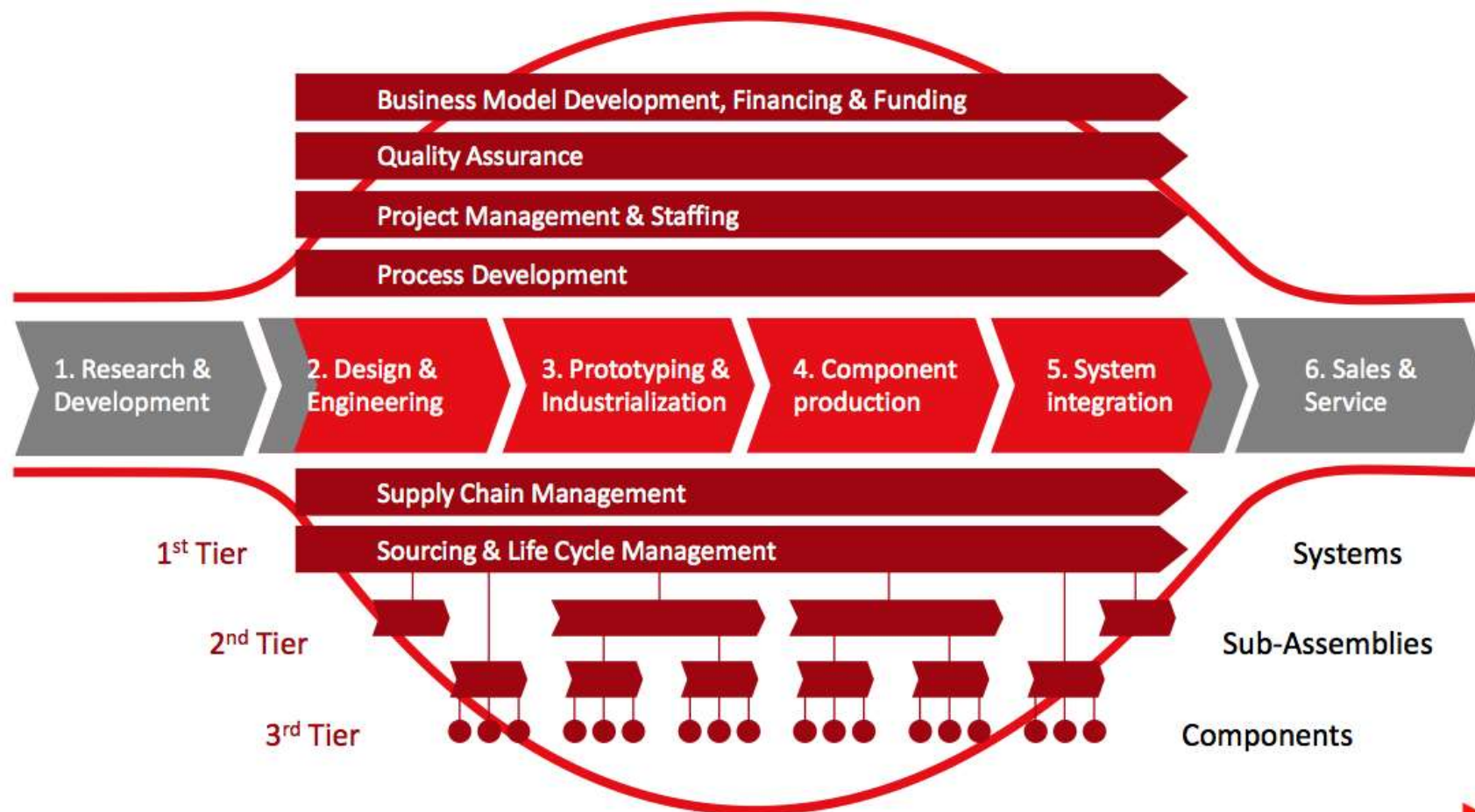
PHOTO VOLTAIC



CO-CREATING THE FUTURE

2020: OPEN SUPPLY CHAIN

- OEM transform to lean companies



CO-CREATING THE FUTURE

ASML

ASML makes machines for making chips

That's a 50-ton, €50-mln precision instrument with 50,000 components

ASML

Public
Slide 3
11 Nov 2014



- Nanometer accuracy across a 30-centimeter wafer
- Rapid acceleration and deceleration (70 kilogram mass, 15 G, 300 times a minute)
- Temperature stability (milliKelvin)
- Optics, vacuum technology, plasma physics, etc. etc.

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ASML

High tech innovation can only happen in an ecosystem

ASML

Public
Slide 6
14 October 2015



CO-CREATING THE FUTURE

ASML

What we need from our ecosystem

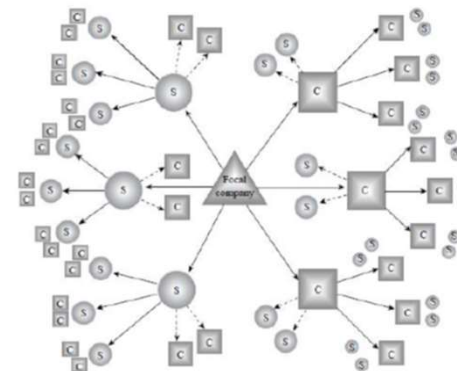
ASML

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Slide 9
11 Nov 2014

Fast access to leading-edge knowledge and skills in a wide range of technologies

Flexibility to adjust to changing business needs and product requirements

Affordable solutions (both development and cost) through the total product life cycle

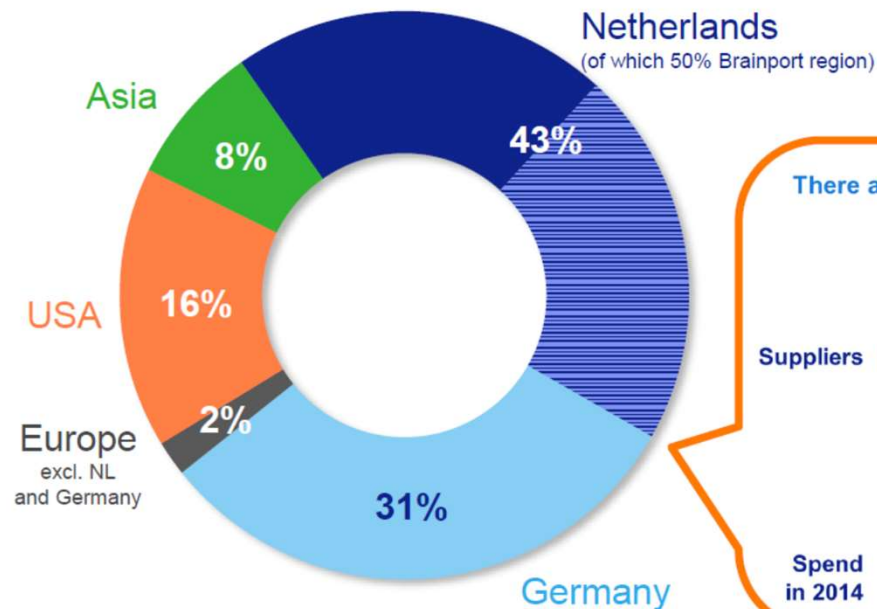


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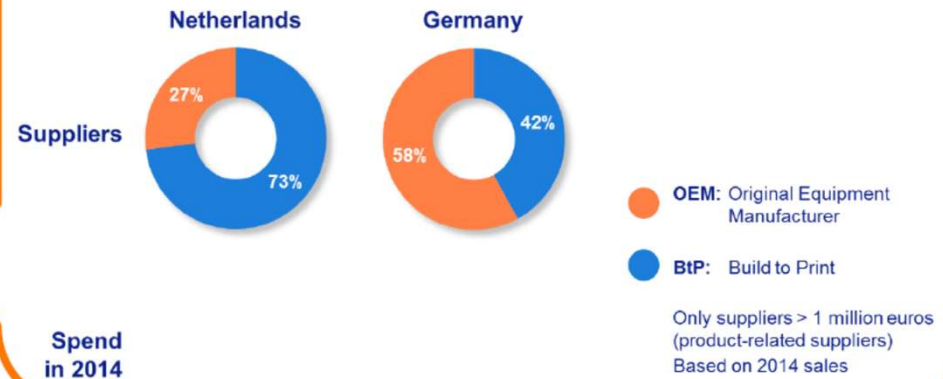
**BRAINPORT
EINDHOVEN**

Suppliers need to help drive cost, quality and innovation
Suppliers need to act more like OEMs, and adopt (more) R&D

Sourcing spend 2014 per region



There are more OEMs among our German suppliers



ASML

Great Supply Chain Performance in bad times

ASML buys 90% of production cost

VALUE SOURCING BV

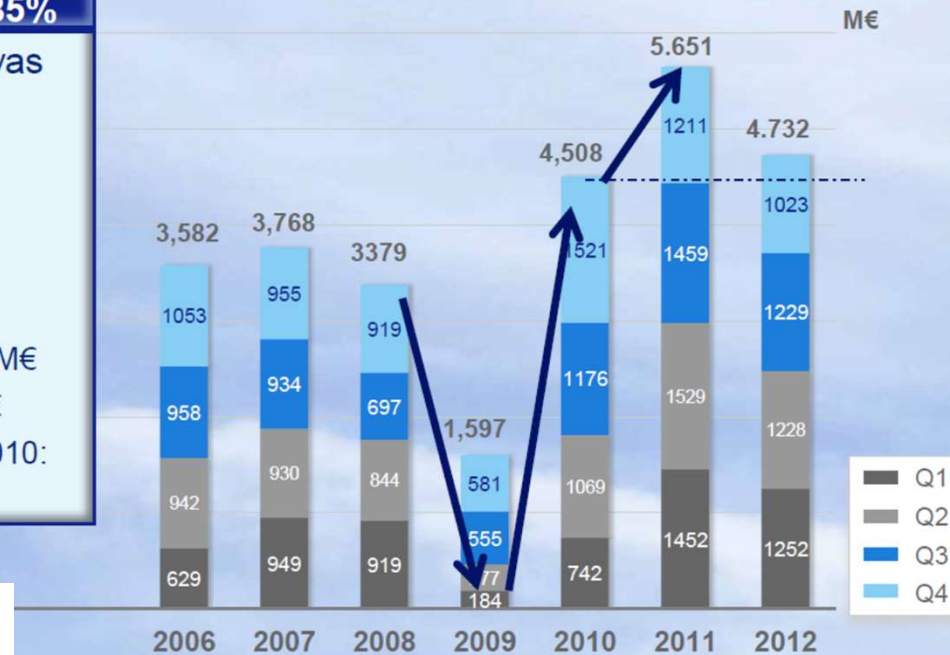
Public

Slide 9

June 19, 2013

08Q4-09Q1: production: minus 85%

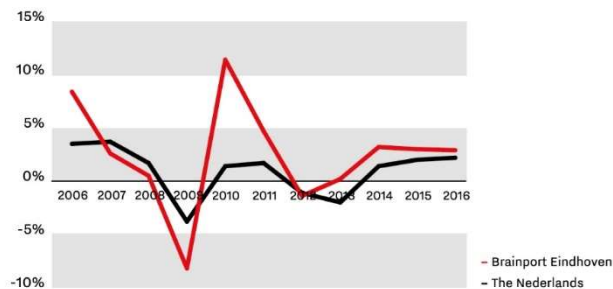
- The entire ASML Supply Chain was able to cope
- No business drop outs
- 2nd tier chain remained in tact
- The entire ASML Supply Chain recovered timely
 - 2010: Highest sales ever: 4.508 M€
 - 2011: Exceeding 2010: 5.651 M€
 - 2012: Higher than record year 2010: 4.732 M€



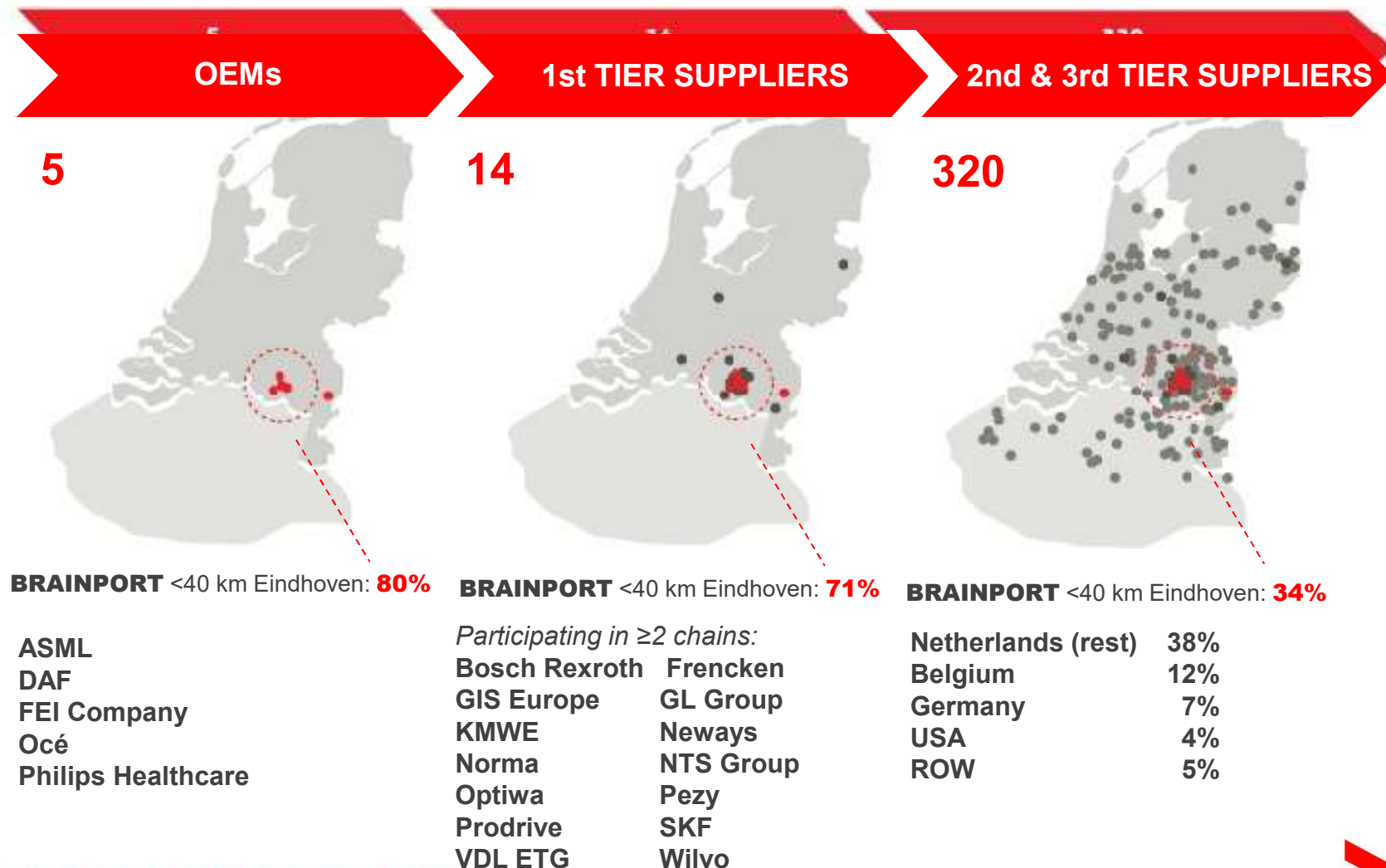
Thanks to market robust suppliers!

Economic growth

GDP volume changes



CO-OPERATION IN THE SUPPLY CHAINS



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KEEP INVESTING IN THE ECOSYSTEM



People



International



Basics



Technology



Business

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Vanguard Initiative

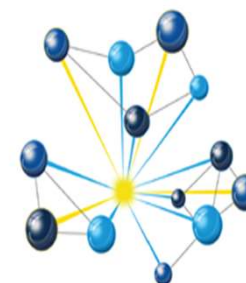
**Regional
Cooperation**

**S3-
Smart specialisation**

Industrial Innovation

Entrepreneurship

**Political
commitment +
practical
organisation**



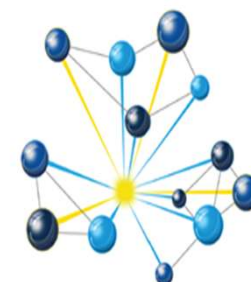
VANGUARD INITIATIVE
New growth through smart specialisation

CO-CREATING THE FUTURE

VI current Member Regions



CO-CREATING THE FUTURE



VANGUARD INITIATIVE
New growth through smart specialisation



Current Members (March 2019)

Members (34)

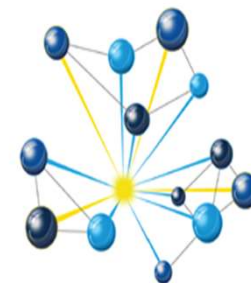
Asturias, Auvergne-Rhône-Alpes, Baden-Württemberg, Basque Country, Cantabria, (Catalonia), East Netherlands, East & West Slovenia, Emilia Romagna, Flanders, Galicia, Lombardy, Lower Austria, Malopolska, Navarra, North Rhine-Westphalia, Norte, Pays de la Loire, Piemonte, Randstad, Region Dalarna, Region Skåne, Region Värmland, Region Örebro County, Saxony, Scotland, South Denmark, South Netherlands, South Tyrol, Tampere, Trento, Upper Austria, Wales, Wallonia

Observers (2)

Gävleborg, Saxony-Anhalt

Associate Members (6)

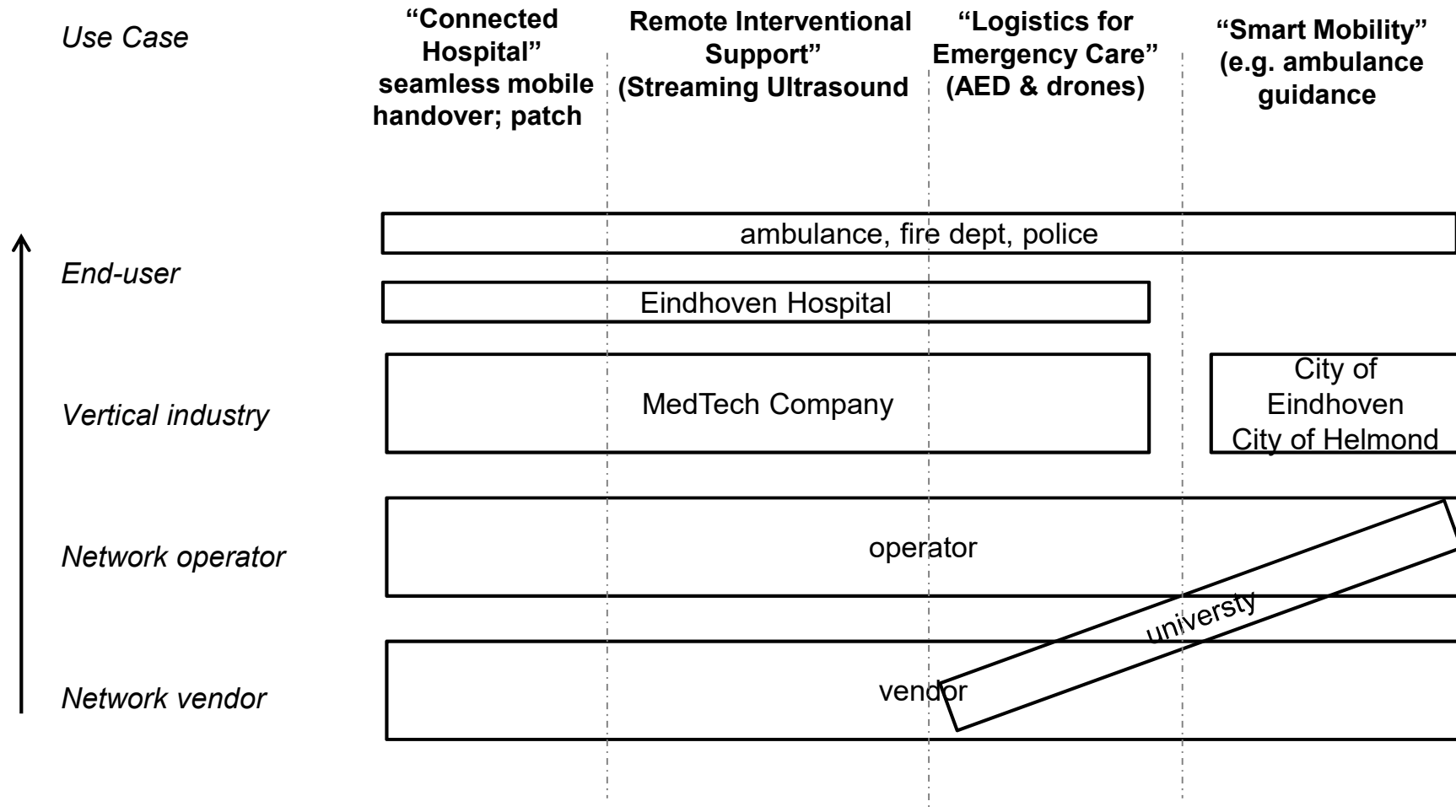
AFIL, Lombardy Green Cluster, Brainport Development, Skåne European office, SPRI, Scottish Enterprise



VANGUARD INITIATIVE
New growth through smart specialisation

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5G enabled Value Chains





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